Board meeting 15 December 2021 Agenda item 7.3

**Investment Summary**

Jake has provided three documents. The first is a two page overview. The second is a 10 page document which may interest some people however page 2 is most useful. In future I will ask Jake to include page 2 or similar in with the overview document.

The third document is in relation to the request Trustees had for a list of companies that are generally not considered due to their ESG / SRI (Environmental, Social, Governance / Socially Responsible Investment) level.

This is an example of common ratings and for the Trust to consider and score accordingly. This will help Jake have a more appropriate strategy.

Helga Perry

Trust Manager